

# IMPLEMENTING WORKFLOW EFFICIENCIES

GOFILEROOM

*"FirmFlow has been great for saving time, monitoring projects, and improving client service."*

**Horovitz, Rudoy & Roteman**, now celebrating 50 years of success in the accounting industry, has implemented GoFileRoom, a web-hosted document management service that allows professionals to access documents instantly—any time, anywhere—from virtual online filing cabinets. Using GoFileRoom's FirmFlow module (formerly TaxFlow™), Horovitz, Rudoy & Roteman has also re-designed its document management and workflow processes to increase productivity and improve efficiencies.

*"Web-based technologies have been a continually evolving process for us,"* said Gordon E. Scherer, Partner at Horovitz, Rudoy & Roteman. *"We began many years ago with tax preparation applications, and then moved into electronic work paper preparation. The next step was a fully integrated document management system."*

*"We searched for a new document management system for over three years, looking for a system that was designed specifically for CPA firms and the way we work,"* Scherer continued. *"Our firm needed a program that was easy to use in terms of storage and retrieval, one that would integrate well with our existing systems, and would have an open architecture design so that we could customize the system specifically for our operational needs. However, we did not want to incur the heavy costs of additional in-house IT staff to maintain it."*

*"GoFileRoom is a cost-effective means in terms of your investment and equipment, the continual maintenance of equipment, and the need for additional personnel to maintain the technology."*

*"So, in looking at all of these issues after a period of time, and being satisfied with the technology itself and the relevant redundancy and security, we felt that GoFileRoom would provide us with effective document management and a wider resource to allow access to our personnel wherever they might be."*

FirmFlow is an add-on module that replaces a firm's paper-based control sheets and enables the electronic routing of tax folders between workflow participants, whether for individuals or groups (i.e. group of preparers). FirmFlow enables accounting professionals to track the entire tax process—from the creation of an electronic tax folder, to the routing of client source documents from preparers to reviewers, to the final delivery of the tax return to the client. FirmFlow also provides real-time tracking and due date management reports for instant visibility into a firm's tax process.

*"I can sit at my computer and see everything that is my responsibility at all times,"* said Scherer. *"The head of our tax department uses GoFileRoom to determine workflow, the status of all projects, and where the bottlenecks are. Our entire firm has been using GoFileRoom for over a year now. By and large, everyone has been very positive. Training and customer support has also been excellent."*

GoFileRoom enables CPA firms to outsource the day-to-day burden of storing and managing both paper documents and electronic files. Customers use the system via the Internet, reducing the need for in-house installation and technical support, as well as the upfront investment typically required for such a system.



## HOROVITZ, RUDROY & ROTEMAN

*Gordon E. Scherer, CPA  
Partner*

### ABOUT HOROVITZ, RUDROY & ROTEMAN

Established in 1956 and based in Pittsburgh, Pennsylvania, Horovitz, Rudoy & Roteman is comprised of six partners and more than 40 qualified staff. As a member of CPA Associates International, the firm primarily serves privately owned companies, family-owned businesses, and individuals.

